DOCUMENT RESUME

ED 178 999 EA 011 943

AUTHOR	Bugher, Wilmer K., Ed.; Tippy, Carol E., Ed.
TITLE	Educational Planning Model: Manual. Phase I. Revised.
INSTITUTION	California State Univ., Chico. Northern California Program Development Center.
SPONS AGENCY	Bureau of Elementary and Secondary Education (DHEW/OE), Washington, D.C.
PUB DATE	78
NOTE	60p.; For related documents, see EA 011 944-945 and ED 073 528-530
AVAILABLE FROM	Phi Delta Kappa, Eighth & Union Street, Box 789, Bloomington, IN 47202 ($2.25)
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	*Community Involvement; *Educational Needs; *Educational Objectives; *Educational Planning; Elementary Secondary Education; *Needs Assessment; Performance Based Education; Program Evaluation; Public Relations; Teacher Participation

ABSTRACT

This manual is a major revision of an administrator's manual concerning educational goals and objectives (ED 073 530). No major changes have been made in the original concept. The educational planning model is a long-range planning model involving community members, professional staff, and students in formulating educational goals. Phase 1 activities, presented in this booklet, enable a school or district to prioritize goals and determine perceived needs. Members of the community are involved in ranking educational goals in order of importance and assessing how well educational programs are meeting these goals. The manual includes strategies for forming representative community committees and for selecting members of these committees, procedures for preliminary planning and organization, and methods for translating needs of the district into performance objectives. A lengthy appendix contains related forms, examples of goals, sample news releases and letters, needed statistical and mathematical methods, and other auxiliary materials. (Author/JM)

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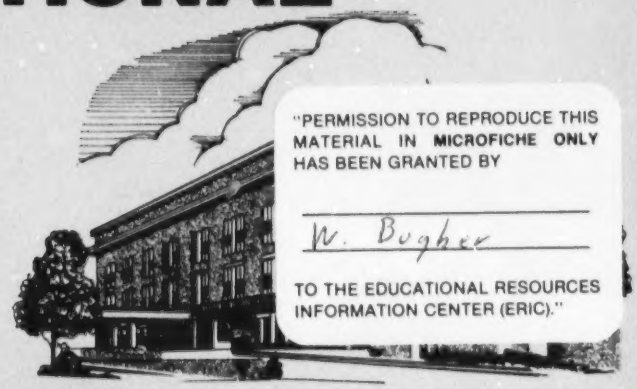
PHASE I

EDUCATIONAL PLANNING MODEL



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MANUAL

DEDICATION

Phi Delta Kappa dedicates the PDK **Educational Planning Model** to the memory of Dr. B. Keith Rose, author of Phases I and II and co-author of Phase III. This organization and education suffered a great loss when, on August 22, 1975, Dr. Rose suffered a fatal heart attack.

As Director of the Northern California Program Development Center, he had provided the leadership that led to development of the planning model and SARI (Systematic Approach to Reading Improvement). It was also his original idea that Phi Delta Kappa undertake dissemination of these programs, an effort that has touched school districts throughout the United States and in many other countries.

Dr. Rose possessed the unusual ability to establish immediate rapport with community groups from diverse backgrounds. He used this ability in representing Phi Delta Kappa as a workshop leader, as a speaker, and as an individual interested in all aspects of education.

To those who knew him best, it was Dr. Rose's deep humanity and endless generosity that made him a great educator. His greatest joy as a professor of education was in providing individual counseling for his students. This generosity led to long hours of work, but it never dimmed his enthusiasm nor thwarted his creativity.

It is fitting that one of Dr. Rose's final accomplishments was completion of the last phase of the planning model that had played such an important part in his recent professional life. His passing leaves a gap that cannot be filled; however, Phi Delta Kappa takes great pride in his PDK membership and in his accomplishments in the service of education.

EDUCATIONAL PLANNING MODEL

PHASE I
MANUAL

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FOREWORD

The **Educational Planning Model** was developed by the staff of the Northern California Program Development Center of Chico, California with a grant from the U.S. Office of Education (ESEA Title III, Section 306) and is distributed by Phi Delta Kappa's Center for Dissemination of Innovative Programs. When Phi Delta Kappa began disseminating the program in October, 1972 it was titled *Educational Goals and Objectives: A Model Program for Community and Professional Involvement.* These materials completed only Phases I and II of a complete educational planning model. The Phase III materials, which complete the model, did not become available until December, 1975. A major portion of the Phase III materials were written by Dr. B. Keith Rose and Dr. Wilmer K. Bugher.

The materials have been used extensively throughout the United States, Canada, and several foreign countries. Sales of materials disseminated from October, 1972 to January 1, 1978 have totaled over $239,000. This manual represents the first major revision in the original administrator's manual for the *Educational Goals and Objectives* materials. This revision does not make any major change in the original concept.

Personnel of the Northern California Program Development Center at Chico, California under contract with Phi Delta Kappa, also added to and revised the manual for the Phase II section of the model. The revision includes a major section on techniques used to train staff members in the writing of two levels of performance objectives and the development and implementation of a management system for the approach. Although several changes were also made in the *Programmed Course for the Writing of Performance Objectives*, which accompanies the Phase II manual, the format remains very similar to the original publication.

Currently, the Phase III manual is undergoing additional field testing in five school districts located in different geographical sections of the United States. It is anticipated that some significant revisions will be made in the manual during the latter part of the 1978-79 school year. In the interim an erratum sheet will be inserted in the Phase III manual to indicate one basic change that is being made in that manual.

Several states have legislation which either mandates or strongly suggests that school districts establish goals and involve the community in carrying out this process. One of the most recent states to enact such legislation is Minnesota. Sections of the Minnesota legislation involving Chapter 271 of the 1976 Omnibus Education Act can be found in Appendix T.

A careful review of the Phi Delta Kappa **Educational Planning Model** will clearly indicate that it can serve as an excellent vehicle for meeting the requirements of legislative mandates. Since the materials are not copyrighted school districts may adapt materials to best meet local needs. Furthermore, if the model is adopted as originally developed, school districts will significantly reduce the time needed to carry out such legislative mandates. Also, a school district may choose to print its own materials if it proves to be more cost effective.

It is strongly recommended that individuals interested in the model secure one copy of all of the component parts of the complete planning model. Although the manuals have been designed to be self-instructional, consultant services are available from Phi Delta Kappa International Headquarters or from one of several affiliated centers.

Questions regarding the services or the materials should be directed to:

Dr. Wilmer K. Bugher
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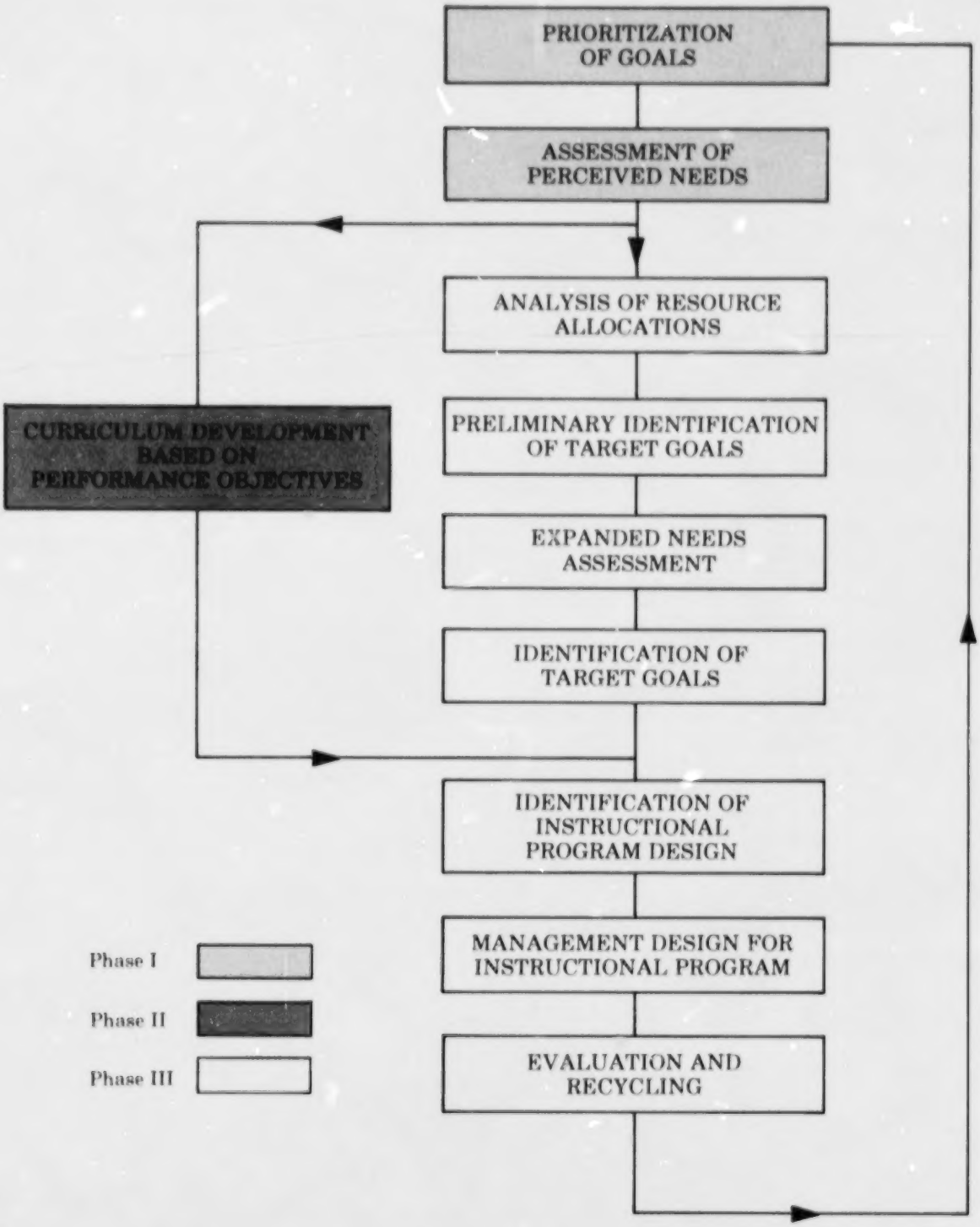
PHI DELTA KAPPA
EDUCATIONAL PLANNING MODEL DESIGN



INTRODUCTION TO MODEL

The Phi Delta Kappa **Educational Planning Model** is a long-range planning model designed to involve community members, professional staff, and students in the decision-making process. There are three different phases in the model. Phases I and II have been available through Phi Delta Kappa since October, 1972. These materials were revised in 1978. The Phase III materials were completed in December, 1975. Additional field testing of the materials will be completed during the 1978-79 school year with the likelihood that some revision of the Phase III materials will be completed shortly thereafter.

An examination of the Educational Planning Model Design on the opposite page indicates that the Phase I activities include prioritizing the goals and determining the perceived needs. The next step involves several alternative activities, some of which are described in this manual and the remaining activities are described in the Phase II and III manuals. The last step in the model is to determine whether the schools in the district are doing a better job of meeting the target goals. If the results of the evaluation plan indicate satisfactory achievement toward meeting the target goal(s), the model design indicates that the process should be recycled. The recycling process involves the representative community committee(s) in identification and prioritization of goals followed by the other activities shown on the Educational Planning Model Design.

The rationale behind the Phase I materials includes the following:

—Schools belong to the community and the community has the right to identify and establish priority goals for their schools.

—Community members should be given the opportunity to express the degree to which they think the goals are being achieved with existing educational programs.

—Administrators, teachers, and students should be given the opportunity to express the degree to which they think the goals are being achieved with existing educational programs.

—Professional staff members need to develop curriculum based on program level and/or instructional level performance objectives.

The Phase I materials described in this manual include a series of strategies that will enable a school or school district to identify and prioritize educational goals and solicit opinions on the extent to which the goals are being met. Members of the community are involved in:

—ranking of educational goals in order of their importance, and

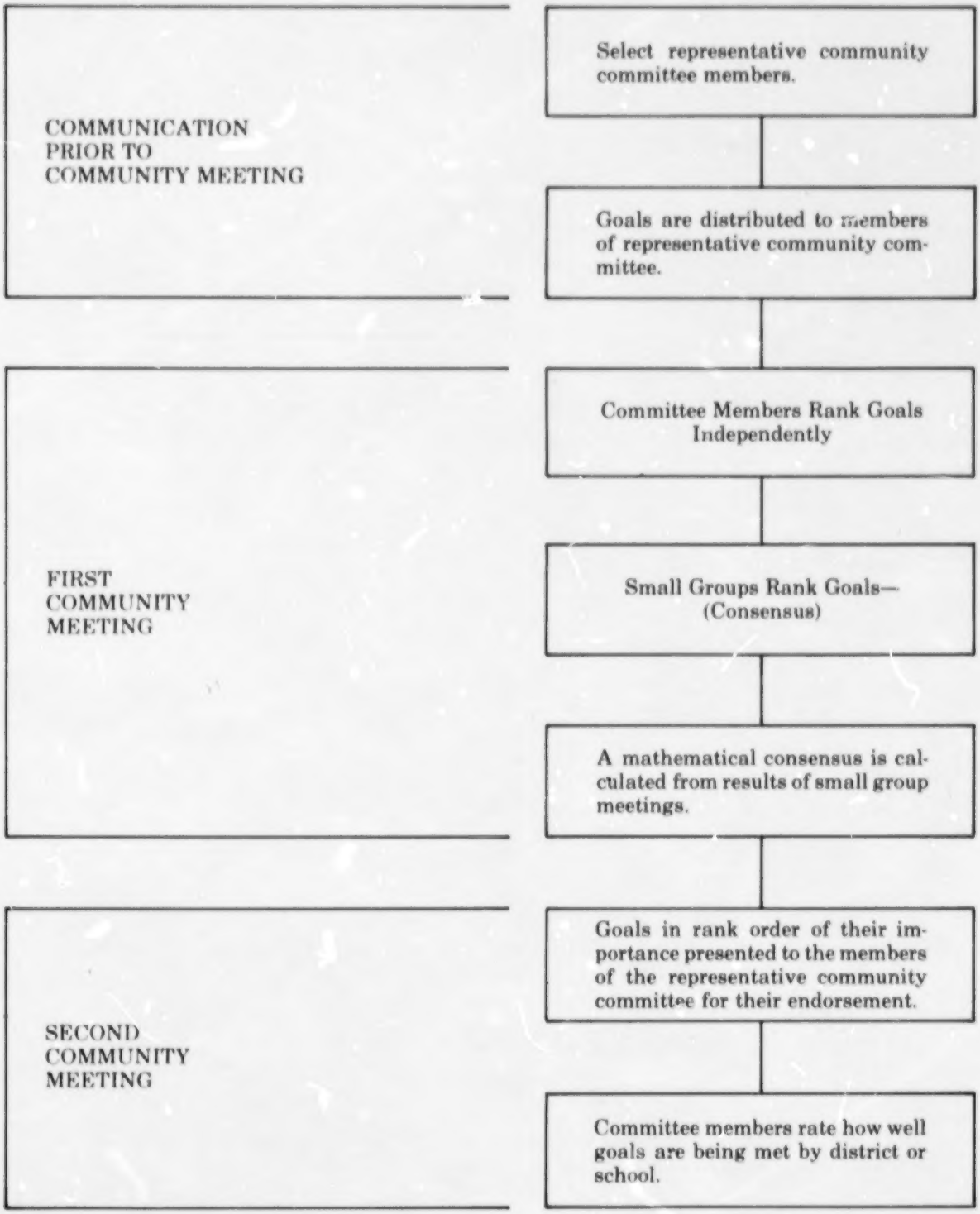
—assessing how well current educational programs are meeting these goals.

This phase of the model may be completed in a time span of from six months to one year without imposing unrealistic time requirements on the participants, while at the same time providing an optimum amount of usable decision-making information.

The remaining portion of this manual will concentrate on the steps necessary to complete the identification and prioritization of goals and the perceived needs activities. It will include a section elaborating on alternatives available in Phase II and III of the model.

The design for the identification and prioritization of goals and assessment of perceived needs will be found on the next page.

IDENTIFICATION AND PRIORITIZATION OF GOALS AND ASSESSMENT OF PERCEIVED NEEDS


COMMUNICATION PRIOR TO COMMUNITY MEETING
Select representative community committee members.
Goals are distributed to members of representative community committee.
FIRST COMMUNITY MEETING
Committee Members Rank Goals Independently
Small Groups Rank Goals—(Consensus)
A mathematical consensus is calculated from results of small group meetings.
SECOND COMMUNITY MEETING
Goals in rank order of their importance presented to the members of the representative community committee for their endorsement.
Committee members rate how well goals are being met by district or school.

Goals are distributed to members of a representative community committee*

The 18 goals used in this program were derived from the 18 goal categories developed in 1969 by the California School Boards Association. This list was completed after a thorough analysis of goals from other states, pilot schools of California's Planning, Programming, Budgeting System, and other sources. The research indicated that the 18 goal categories of the California School Boards Association were all encompassing and acceptable as a starting point for most citizens of the community. From the many field tests which have been conducted using these 18 goals, it has been found community members rarely suggest additional goals and the 18 goals are accepted as legitimate aims of educational institutions.

Once the community committee is selected, each member is sent, prior to the meeting, a list of the 18 goals and is asked to:

—become familiar with the goal statements and discuss them with friends and neighbors, and

—if the member believes there are other important educational goals, which are not included in the list of 18, to immediately contact the school district office to discuss them with the superintendent or designee.* Additional goals may be considered at the first community meeting.**

Committee members rank goals independently

After the orientation session at the first meeting, members of the committee will proceed to individual work tables where they will independently rank in priority order the 18 educational goals. Each committee member will have an individual display board, a set of 18 goal statements, and 45 red discs.*** Each committee member then begins ranking in order of their importance the goals on a display board. As each individual completes the display board, the score for each goal is transferred to an individual goal rating sheet.****

Small group ranks goals—consensus

When the individual goal ranking is complete, the committee member takes the individual goal rating sheet to another room where refreshments may be served. Prior to this, members of the committee are randomly assigned to groups of four.

The task of the small group is to reach a group consensus or agreement on one display board for the 18 goals.*****

*See Appendix A for list of goals.
**See Appendix B for information on adding, deleting, or adapting goals.
***See Appendix C for rationale for number of discs.
****See Appendix D for directions for individual members.
*****See Appendix E for directions for small groups.

A mathematical consensus is calculated from results of the small group meeting

After a group consensus is reached the scores are recorded on a small group rating sheet and brought to a person in a central location where the scores for each group are registered on a total summary sheet. When all of the small groups have completed their work the average for each goal score is computed. Because small groups vary significantly in the time required to complete the consensus activity, some of the committee members may choose to leave the meeting; however, there will be those who remain to see the results of their efforts. After the goals have been prioritized the variance can be computed.

Goals in rank order of their importance presented to members of the representative community committee for their endorsement

At the beginning of the second meeting the committee members are informed regarding the results of the first meeting. Community members may record this information on the Community Priority Ranking of Goals form. At this time they are given the opportunity to endorse the goals for the school district.

Committee members rate how well goals are being met by district or school*

Committee members are then asked to rate the goals of the district in terms of perceived performance levels. They will be requested to ask themselves two questions:

—In my opinion how well are current programs meeting this goal?

—Is this goal really the responsibility of the school?

At this point in the process the professional staff and students will be asked to complete the same task and ask themselves:

—How well are my school's current programs meeting this goal?

—Is this goal the responsibility of the school?

In involving the professional staff and the students, the school district may wish to have responses from all teachers and upper grade students or from randomly selected groups of teachers and/or students. So that the professional staff may be familiar with the prioritization process, some districts may choose to involve the entire professional staff earlier in prioritization of goals. To comply with the rationale of the Phase I activities, however, the community decisions must be final with

*See Appendix F for directions for rating level of performance.

regard to the identification of and the prioritization of goals for the district. Upon completing this part of Phase I activities the administrative staff of the school and/or district will have the data necessary to complete the process of Preliminary Identification of Target Goals. Also, the data will enable the staff to complete the initial activities of two other steps in the planning model:

—Expanded Needs Assessment

—Identification of the Target Goals.

Part of the information necessary to complete these two additional activities will be included in this manual, however, for a more complete description of the procedures please refer to the Phase III manual of the **Educational Planning Model.**

STRATEGIES FOR FORMING REPRESENTATIVE COMMUNITY COMMITTEE(S)

The desirable strategy for determining the number of representative community committee(s) depends upon, but is not limited to, the desired amount of community involvement, the degree of decentralization of the decision making process, and the variation in clientele served by the schools in the district. The three different strategies included in the model are:

1. Select one representative community committee for the entire district.

2. Select one representative community committee for each school in the district.

3. Select one representative community committee for each grade level grouping in the district (e.g. elementary school, middle school or junior high school, and senior high school levels).

In ranking the goals it becomes quite obvious that community members will give different priorities to certain goals depending upon the exit grade level for the school. This applies of course, only to strategies two and three. In implementing either of these two strategies the school district may choose not to rank the goals at the district level but to adopt goals on a nonpriority basis leaving each school or each grade school within the district with established priorities for its attendance area(s).

Advantages of choosing strategy two would include but not be limited to the following:

—community members would be given the opportunity to have a direct impact on the educational program at the school building level

—more members of the community would be involved thereby greatly expanding number of informed community members

—some flexibility could be granted at the school building level in the development and implementation of instructional programs designed to meet selected target goals

—if the clientele in the schools varies significantly, different educational programs could be developed to meet these needs

If the school district does not want to embark on an ambitious program as required in strategy two, it is recommended that careful consideration be given to strategy three. Strategy three would retain most of the advantages of strategy two as well as significantly reduce the time required for implementation. Educational programs could be developed at the elementary, middle school or junior high school, and senior high school levels to meet the selected target goal(s) for each level.

STRATEGIES FOR SELECTING MEMBERS OF REPRESENTATIVE COMMUNITY COMMITTEE(S)

The strategy for selecting members of the representative community committee(s) can have a definite influence upon the implementation of the **Educational Planning Model.** Any strategy, which at a later date can be perceived as having been manipulated by superintendent and/or board of trustees will automatically create problems. For this reason it is recommended that the news media be appraised of the various options available and the reason for selection of a particular strategy. If the news media gives support to the strategy selected, in all likelihood it will give its continued support to the implementation of the program. The advantages and the disadvantages of four possible strategies will be discussed in the sections which follow.

Random Selection Strategy

RANDOM SELECTION STRATEGY:

Definition: any selection strategy in which the members of the committee are selected randomly without prejudice; that is, each member of the community is a likely member of the committee—equal likelihood of selection.*

This strategy is the single strategy recommended by PDK's Center for Dissemination and has been used most extensively.

The *advantages* of the random selection strategy are:

—a "pure" cross section of the community is more easily obtained

—the most publicly defensible strategy one can initiate

—committee membership can be obtained in a relatively short period of time

—generates positive reactions from the community

The *disadvantages* of the random selection strategy are:

—known opinion leaders in the community may not appear on the committee

—the superintendent and board of trustees have no control over the committee composition

—the superintendent and board of trustees must work with "unknown" quantities

—the selection of the committee members takes more personal effort on the part of the district administrator

—it is more difficult to achieve initial commitment from community members

Direct Control Selection Strategy

DIRECT CONTROL SELECTION STRATEGY:

Definition: any selection strategy in which the superintendent and/or board of trustees, directly nominates and appoints members to the representative community committee.

*See Appendix G for discussion of random sampling techniques.

The *advantages* of the direct control selection strategy are:

—careful selection can allow the committee to come to an early consensus

—careful selection can guarantee articulate dissemination

—known political/social/economic opinion leaders can be appointed

The *disadvantages* of the direct control selection strategy are:

—committee consensus may not reflect community consensus

—the locus of political and economic power in a community is often difficult to find and more often misread (election failures are typical of political miscalculation)

—committees chosen by the direct control selection strategy often become the focal point of community alienation, particularly when community opinion is expressed in the voting booth

—boards may tend to select individuals who reflect their own views—lack of cross section

Indirect Control Selection Strategy

INDIRECT CONTROL SELECTION STRATEGY:

Definition: any selection strategy in which a specific set of criteria acts as the final authority for selection of members for the representative community committee.*

The critical factor in the use of this strategy is the use of a set of criteria which acts as the final authority in the selection process. For example, the superintendent and/or board of trustees may develop criteria upon which to base the selection of the committee membership. Though the superintendent and/or board of trustees, will select the members of the committee, selection has been limited by the adopted set of criteria.

As an alternative, the superintendent and/or board of trustees, may choose to select an "interim selection committee"—this outside agent is the criteria—whose function will be to select members for the representative community committee. In both cases some control over the selection process and, therefore, over the committee membership has been maintained.

The *advantages* of the indirect control selection strategy are:

—selection process can reduce the chance of community alienation

—the chance for cross section representation is increased

—danger of misreading the political/economic locus of power in the community is diminished

—this strategy allows the superintendent and board of trustees to develop basis for community support in other areas of need

*See Appendix H for discussion of indirect control selection strategy.

The *disadvantages* of the indirect control selection strategy are:

—additional time may be needed to reach consensus

—articulation may not be at optimum level

—the possibility exists that the superintendent and board of trustees may lose some policy-making power

—an interim selection committee may not have the resources necessary to select a representative cross section of the community

Unstructured Selection Strategy

UNSTRUCTURED SELECTION STRATEGY:

Definition: any strategy which effectively results in the initiation of the goal-setting process without any numerical limitations placed on participation.

This particular strategy is intended for situations in which the superintendent and/or board of trustees believes an open invitation should be extended to all citizens residing within the boundaries of the district to participate in the identification and ranking of the district's educational goals. There appears to be only one situation in which this strategy can be employed effectively. This is where the individual school or school district population is small enough to accommodate a New England type of "Town Meeting." It is contended that the maximum manageable number of a "Community Committee" is 60.

The *advantages* of an unstructured selection strategy are:

—total community involvement is possible

—publicly defensible

—dissemination is accomplished rapidly

The *disadvantages* of an unstructured selection strategy are:

—the management necessary to give group direction is most difficult to achieve

—committee membership may be unmanageable

—communication and articulation can be most difficult to achieve

—town meetings often become forums, not working committees

—continuity of committee work is more difficult to maintain

—the general tone of the town meeting may tend to lead to factionalization and not consensus and direction

The strategies mentioned above are not all inclusive. It becomes quite obvious that a combination of selection strategies can be used. For example, a school or a school district may have a very active citizens committee of 20 people. It is possible to include these 20 people on a repre-

sentative community committee on a districtwide basis and use a random sample for selecting the remaining members of the committee. Another alternative might involve assigning randomly the 20 active citizens committee members to three representative community committees (elementary, middle or junior high, and senior high school levels) with the balance to be determined by a random selection strategy. The alternatives are numerous. The needs of the community will determine the best strategy or combination of strategies.

PROCEDURES FOR PRELIMINARY PLANNING AND ORGANIZATION

The best procedure for planning model implementation for a school district can only be determined by carefully examining conditions at the local level. For example, if a collective bargaining agreement mandates staff involvement in the selection of a model, obviously, a grievance will be filed if this procedure is not followed. On the other hand, the very nature of the size of the district, availability of funds, professional training of both teaching and administrative staff, public attitudes toward schools in the district, and many other factors should be considered when making the decision as to what would be the best method to use in completing the preliminary planning and organizational activities.

An examination of the **Educational Planning Model** reveals that it requires a strong commitment from the superintendent and board of trustees. In some cases administrators and board members have concerns regarding giving up some of their decision-making authority. This is especially true for elected board members who feel that they were elected by the community to make decisions for the community. Such board members will usually take the position that if the community is not satisfied with their performance, they can be replaced at the next election. Actually, experience to date indicates that when the model is properly implemented, it does not infringe upon the authority of the administration and board members. In fact, it provides additional decision making information for both.

Experience has shown that better informed community members are more likely to support good educational programs, especially if the community members have had some viable input into the decision-making process. Also, the planning model, especially in the Phase II activities, provides an opportunity for the teaching staff to have viable input into the decision-making process. The Phase II procedures encourage input in an area where teachers have the greatest expertise—in the area of writing performance objectives and developing instructional programs to meet target goals of the district. The chance of an instructional program succeeding in any district is greatly enhanced if it has strong support from professional staff.

The best method of obtaining board support for Phase I activities is to have each member participate in a "hands-on" experience utilizing the Phase I materials. If this is not feasible then a viable alternative is to have a consultant or a local administrator present an overview of planning model materials. In either case the initial presentation must clarify the following:

—detailed explanation of the Phase I materials and an overview of Phases II and III

—the degree of commitment from the school district

—products that result from the program

—a tentative commitment of district personnel and time

—a tentative plan for implementing the Phase I portion of the program

Initial Planning Suggestions

For preliminary planning and organization there are two methods that are most commonly used. One method involves the use of a "board/administrative/staff committee" and the other the use of a "district task force". As indicated previously local conditions will determine if either of these methods are appropriate for preliminary planning and organization, or, if some other method would more suitably meet local needs.

The "board/administrative/staff committee" method seems to be the easiest and quickest method to implement. It is recommended that the membership of such a committee include one elementary education specialist, one secondary education specialist, one board member, and additional administrators and teachers. Preferably there would be at least one administrator and teacher each from the elementary, middle school or junior high school, and senior high school.

An alternative to the above method would be to form a "district task force". The task force membership could include, but not necessarily be limited to board member(s), representatives of community civic organizations, representatives of parent organizations, representatives of all levels of the administrative and teaching staff, representatives of a taxpayer's association, and representatives of local teacher and/or administrative organizations. Generally a district task force would be significantly larger than a board/administrative/staff committee. If the district task force approach is selected, only a small committee from the force would conduct the community meetings and meetings with staff members and students.

For either of the two above mentioned methods, or for any other options developed by a school or district, it is highly recommended that the members of the preliminary planning and organization committee be involved in a "hands-on" experience using all materials in the Phase I portion of the planning model.

Upon the completion of these activities members could be given a brief overview of Phases II and III.

Duties of Implementation Team

Duties of a board/administrative/staff committee or a district task force, hereafter referred to as "team", will include development of a proposed time line*, and, the necessary personnel assignments for completing suggested implementation activities as follows:

1. Send news releases to all local media outlining proposed programs.**
2. Present an overview of materials or conduct a "hands-on" experience with these materials for members of the board of trustees. The "hands-on" experience will involve the same activities that the community members will be involved in as they complete the two community meetings.
3. Secure board approval for the program and the technique to be used in the selection of the members of the representative community committee, hereafter referred to as "committee". Total membership per committee should number between 40 and 60 persons.
4. Issue news release summarizing board's actions.***
5. Present audiovisual program to administrative and teaching staff.
6. Implement selection strategy.
   a. All community members whose names have been selected must be contacted by letter**** and through personal contact by team members.
   b. If at all possible the superintendent or designee should also make contact with community members.

*See Appendix I for time line planning form.
**See Appendix J for news release.
***See Appendix K for news release.
****See Appendix L for sample letter.

7. Send a second letter* to each community member as each committee position is confirmed, notifying the member of the time, place, and format of the first committee meeting. Included in this letter will be a set of the 18 goal statements with goal clarifying statements for each.

8. Issue news release giving time, place, and format of the first committee meeting.**

9. Complete the following tasks prior to the first committee meeting:

   a. Arrange for the meeting site. Regardless of the size of the committee, there must be a "work" atmosphere. The following lists the usual physical requirements:

      i. One large room with enough space to accommodate the entire committee for information receiving purposes should be used.

      ii. Each member of the committee should have an individual work area in the large room. Three or four members at a large cafeteria-type table usually works well.

      iii. A second room in close proximity to the large meeting area and large enough to accommodate approximately one-half of the committee should be made available, and supplied with refreshments.

      iv. Enough classrooms should be made available to accommodate small groups of four committee members each, with no more than four small groups assigned per classroom. If the large room has sufficient space so that the small groups are not too crowded, it is much more convenient to have all of the small groups meet in one large area with individual tables having four chairs per table. Using this approach it is much easier to monitor the activities and it will eliminate the need to use monitors as outlined in section b, number iv below.

   b. Provide for other meeting requirements as follows:

      i. Prepare name tags for each member of the committee.

      ii. Prepare name tags for each member of the team.

      iii. Provide pencils for each committee member.

      iv. Provide training for monitors, if required. A one-half hour training session should be held for the monitors (teachers and/or administrators) prior to the first meeting. The purpose of this training session is to make sure the monitors are familiar with the processes which will take place in the small group sessions at the first general meeting.

      v. Construct a large display board to be used for demonstration purposes at the first general meeting or paste the goal statements and the red discs on a sample goal board.

      vi. Prepare different sets of small group cards with same letter on each set of four cards. The number of cards to be prepared depends upon the number of committee members. For example, if the committee is composed of 60 individuals, 15 sets of four cards each will be required. All four cards in a set will have the

*See Appendix M for sample letter.
**See Appendix N for news release.

same letter on them. In this case there will be sets lettered from A through O. In the event the group is a very large group and the number of small groups exceeds 26, additional sets of cards can be prepared using two letters for each card. For example, there could be four cards lettered "AA", another set of four lettered "BB", etc. The expected seating arrangement may also be clarified by identifying the tables with a four by six inch or larger size file card folded, with the appropriate letter(s) written on each side of the folded card.

vii. Assign one member of the team to serve as a "tally clerk".

viii. Secure an adding machine or calculator.

ix. Assign specific tasks to members of the team as required to carry out any other procedures for the first general meeting.

10. Direct the first general meeting of committee.

a. Place all materials at individual work stations about one-half hour before the meeting starts.

b. Select at least one team member, or if possible two, to serve as host(s) or hostess(es) at the entrance to the meeting area. Committee members can be greeted and name tags distributed.

c. Direct the members of the committee to a common area of room—not their individual work stations. A semicircle or horseshoe arrangement of chairs at one end of the large room works well for a seating arrangement.

d. Open the meeting with a welcome from the district superintendent and the president of the board of trustees. This opening is simply a greeting and an expression of thanks to the participants and should take no longer than 10 to 15 minutes. Remember to include rationale for the prioritization of the 18 goals.

e. Direct the committee members to seats at the individual work stations to await further instructions.

f. Review the goal ranking procedures after the committee members have been seated at their individual work stations. The review should take no longer than 10 minutes and it is recommended the following review technique be used:

i. Read direction number 1 found on page one of Directions for Individual Members of the Representative Community Committee to make sure all committee members have all the necessary materials.

ii. Review the directions numbered 2 through 9.

iii. Carefully read direction number 10—a through e. Emphasize to the participants that the success of the entire meeting depends on each member following these basic directions.

iv. Review direction number 11.

v. Explain that after working individually each member will be assigned to a small group and that the small group cards will be distributed later during this first part of the meeting.

vi. Explain that after each member has completed the display board and trans-

ferred the points to the individual summary sheet the member may leave the individual work station for refreshments.

g. While the committee members are ranking goals individually, one member of the team should distribute a small group identification card to each member. To ensure a sufficient number of small groups and group diversity it is recommended that group identification cards be prepared for four members to a group and that the cards be shuffled and handed out to members in random order.

For example, if there are fifty members present there can be twelve groups of four with two individuals not assigned. Prepare sets of group identification cards with each set having four cards with the same letter. In this case it would be necessary to letter cards A through L (48 cards). These cards would be shuffled and distributed. When small groups are formed the two individuals not receiving a card would be asked to join any existing group with four members. Using this method there would be ten groups of four members each and two groups of five members each. If the group size of four is not feasible it is usually more desirable to go to a smaller group of three rather than a group of five. Past experience, however, has indicated that the ideal size for a small group is four.

h. Direct committee members to report to tables according to letter on group identification card. Review the processes groups are to follow. Note that each small group should have one goal display board, one set of discs, 18 goal statements, Directions for Small Group Leader, Round 1 and 2, with Small Group Rating Sheet on the reverse side of the round 2 directions.

If it is necessary to use additional outside rooms, monitors should escort the groups to their assigned rooms.

i. Visit each small group at least twice during the evening. During the last visitation, inform the group leader that when the Small Group Rating Sheet is completed it should be taken to the tallying station. It is important that the small group leader—not the monitor—take the group summary sheet to the tally station. The remaining members of the group can report back to the refreshment room. The time required to complete the small group rating activities can range from 30 to 90 minutes.

j. Record and tally the results of each group's work on the Total Summary Sheet.*

k. Rank goals according to results and report to committee members who are still in attendance.

11. Complete the following tasks between the first and second general meetings:

a. Send news release to all media sources announcing result of first meeting and date and time of next meeting.**

b. Send description of results of goal ranking process to professional staff.

c. Send letter to all participants giving results of first meeting and time, date, and place of second meeting.***

d. Prepare name tags for each committee member for second meeting.

*See Appendix O for mathematical procedures for tally clerk.
**See Appendix P for sample news release.
***See Appendix Q for sample letter.

e. Schedule meeting to have members of team review their reactions to first general meeting.

f. Complete reminder phone call to each committee member one day prior to the second meeting date.

g. Arrange for the professional staff and students to complete the instrument Individual Rating of the Level of Performance of Current School Programs the day after the second community meeting.

12. Complete the following procedures for second general meeting:

a. Place materials for meeting at each individual work station one-half hour prior to meeting time. These materials include the Community Priority Ranking of Goals form and Individual Rating of the Level of Performance of Current School Programs.

b. Assign team members to greet committee members and distribute name tags.

c. Direct committee members to individual work stations. Present results of first meeting. Community members may wish to record results on Community Priority Ranking of Goals form.

d. Review the directions found on the Individual Rating of the Level of Performance of Current School Programs sheet.

e. Request each committee member to rate the achievement of each goal.

f. Request each member of the committee, after rating the achievement of goals, to take the member's summary sheet to the tally clerk.

g. Record and tally the results on the total summary sheet.* While the results are being tabulated the committee may be reassembled to hear the superintendent explain briefly what will be the final result of the committee's work; i.e., writing performance objectives and relating these objectives to the ranked goals. This period should also provide time for questions and answers.

h. Mail the results of the evening's work to the committee members within a week (see 13 a below).

13. Complete the following procedures after the second general meeting:

a. Send letter of appreciation to all committee members with summary of results of second meeting.**

b. Schedule meeting with the professional staff and students to complete the Individual Rating of the Level of Performance of Current School Programs. When the staff meets to complete the instrument, they should be given common directions for administering the instrument to students. The students who complete this form may be chosen by random sample or the entire student body may participate at the discretion of the team.

c. Complete the recording and tally the results of the second meeting. It is suggested these procedures be followed carefully if a school district is to get the optimum amount of usable decision-making information.

d. Send news releases to local media sources summarizing the final results.

*See Appendix R for mathematical procedures for tally clerk.
**See Appendix S for sample letter.

TRANSLATING NEEDS OF THE DISTRICT INTO PERFORMANCE OBJECTIVES

The community is now aware that:

—the district has goals

—these goals are ranked in priority

—variations exist in the community members', staff members', and students' perceptions of the degree to which the current instructional programs are achieving each of the goals

Experience indicates that there is usually significant disagreement among community members, staff members, and students on the degree to which many of the goals are being achieved. Usually when staff members and students prioritize goals, the results of the two groups are similar to the prioritization given by community members. There are exceptions, however, in most cases these differences have not been nearly as significant as the variation in the perceived needs scores.

Identifying Target Goal(s)

Using the community members' perceived needs scores and prioritization scores the goals can be ranked from the number one target goal to the least important target goal. A target goal is identified by subtracting the priority score from the perceived needs score for each of the 18 goals. The goal with the largest negative score is the number one target goal, the goal with the second largest negative score is the number two target goal, etc. On the two pages which follow, directions and a form for completing this ranking are outlined. Although this is one of the activities outlined more completely as part of the Phase III procedures, it can be completed as soon as the data is available from community members.

The administration will be responsible for completing the form on the facing page using the following instructions:

1. Enter the average score of groups rating perceived needs in column B for each goal.

2. Enter the average score of groups ranking goals in column D for each goal.

3. Compute the estimated population variance for the groups that prioritized the goals and the groups that determined perceived needs scores. Refer to Appendices O and R for mathematical procedures. Enter the variance results in columns A for needs and C for goals.*

4. Subtract each goal result in column D from the result in column B on an individual goal basis. Negative numbers will indicate goals with relatively high priority and low perceived performance scores.

5. Determine the ranking of target goals in column F by numbering one to 18 on the basis of the largest negative value to the largest positive value respectively.

*Variance data indicate the extent of agreement among groups contributing to the average score and reflect the level of confidence that can be placed in a computed mean.

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RANKING GOALS ACCORDING TO PERCEIVED PERFORMANCE AND PRIORITIZED GOAL SCORES

GOALS	A VARIANCE OF GROUPS RATING PERCEIVED NEEDS	B AVERAGE SCORES OF GROUPS RATING PERCEIVED NEEDS	C VARIANCE OF GROUPS RANKING GOALS	D AVERAGE SCORES OF GROUPS RANKING GOALS	E DIFFERENCE BETWEEN AVERAGE SCORES (B-D)	F RANKING OF TARGET GOALS
1. Learn How To Be A Good Citizen						
2. Learn How To Respect And Get Along With People Who Think, Dress, and Act Differently						
3. Learn About And Try To Understand The Changes That Take Place In The World						
4. Develop Skills In Reading, Writing, Speaking, And Listening						
5. Understand And Practice Democratic Ideas And Ideals						
6. Learn How To Examine And Use Information						
7. Understand And Practice The Skills of Family Living						
8. Learn To Respect And Get Along With People With Whom We Work And Live						
9. Develop Skills To Enter A Specific Field Of Work						
10. Learn How To Be A Good Manager Of Money, Property, and Resources						
11. Develop A Desire For Learning Now And In The Future						
12. Learn How To Use Leisure Time						
13. Practice And Understand The Ideas Of Health And Safety						
14. Appreciate Culture And Beauty In The World						
15. Gain Information Needed To Make Job Selections						
16. Develop Pride In Work And A Feeling Of Self-Worth						
17. Develop Good Character And Self-Respect						
18. Develop Skills In Mathematics And Science						
19.						
20.						

Expanded Needs Assessment

The next major task to be completed is to determine if the community's perception of goal achievement for the number one target goal is, in fact, an accurate perception. For example, the community may believe that the number one target goal is not being met satisfactorily by the existing programs, and yet, standardized test scores may reveal that an exemplary job is being done to meet this goal. If this should be the case for the number one target goal then a need exists to disseminate this information to the community members and to the news media in general.

In some cases community members may be skeptical about the achievement test score results. The administrative staff and the board members should indicate a complete willingness to make all hard data available for review by members of the representative community committee. This does not mean that individual student scores will be released but every effort should be made to indicate that the data is available and individuals are welcome to examine it. It might be advisable to offer to employ an outside consultant approved by the members of the representative community committee to make an independent review of the achievement scores and other supportive data and to submit a written report to the professional staff, community members, and news media. The rationale for using Phi Delta Kappa's **Educational Planning Model** includes a sincere commitment to make information available on all aspects of the educational program except confidential information regarding its employees and students. The complete open door policy to information not only gains support from the news media but it greatly enhances the confidence community members have in the professional staff and board members.

If the available data supports the community members' perceptions that existing educational programs are not adequate for the number one target goal, the next step would be to translate these needs into performance objectives.

The Phase II *Curriculum Development Manual* contains detailed suggestions for training staff members to write performance objectives. It also includes a major section dealing with the development and implementation of management systems. Since school districts will need to develop instructional programs to better meet the identified needs for selected target goals, the district should proceed to train a cadre of teachers and administrative staff members to complete the writing of performance objectives.

This section of the PDK **Educational Planning Model** requires more time and effort than any other activity in the model. Obviously, the number of target goals selected has a direct bearing on this activity. It is strongly recommended that no more than two target goals be selected at any one time. It is also recommended that a target goal be selected in the cognitive domain for the first experience. If it is desirable to choose two goals, it might be helpful to choose one in the cognitive and one in the affective domain.

It is beyond the scope of this manual to discuss the expanded needs assessment activities in great detail. For more information on expanded needs assessment, please refer to the Phase III manual of Phi Delta Kappa's **Educational Planning Model.** The Phase III manual contains many suggestions regarding other sources of data which might be beneficial for determining the validity of the community's perceived needs.

Summary

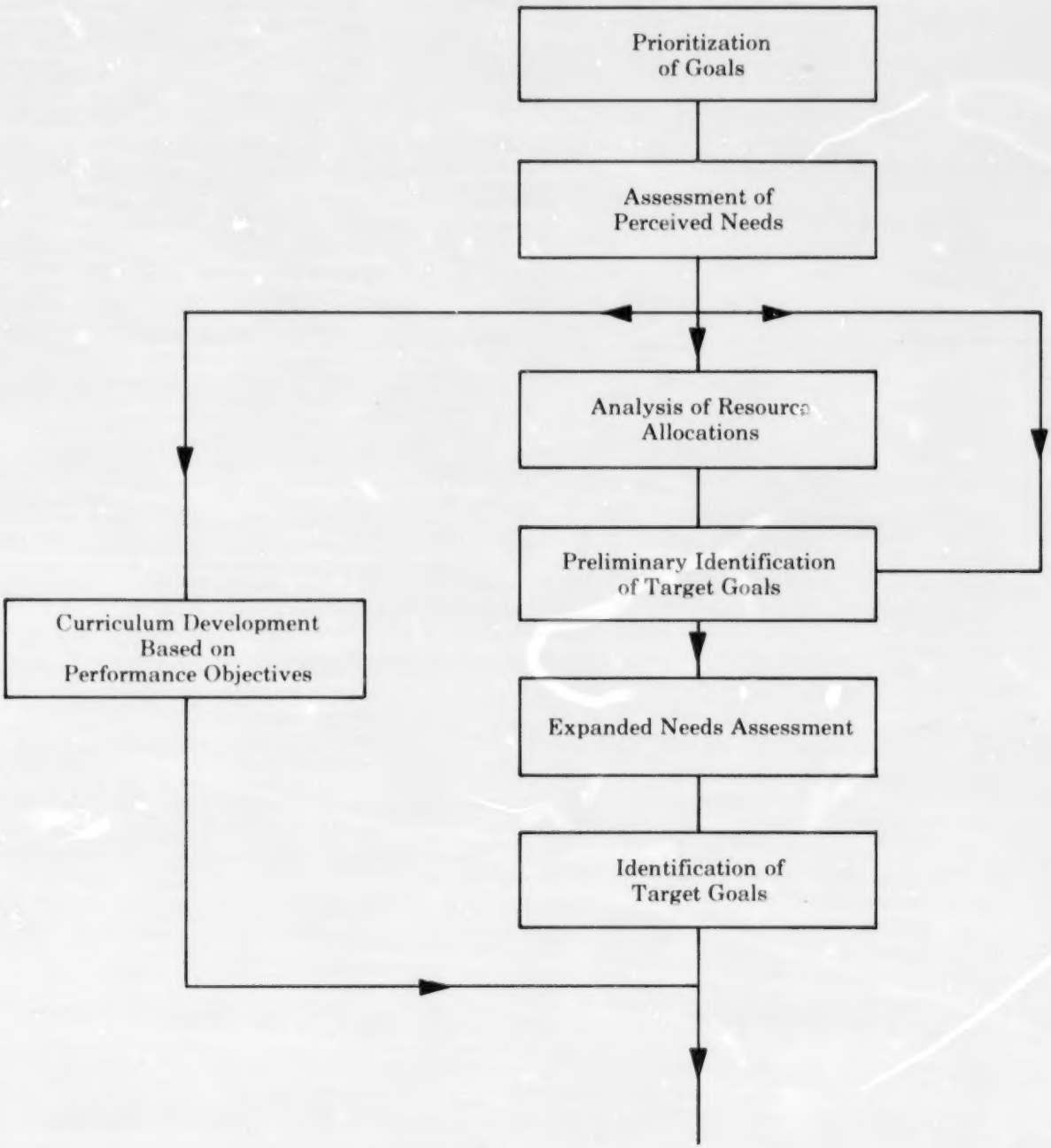
It is the basic assumption of the developers of this process and writers of this manual that the community will respond positively to public education when presented with evidence directly related to student performance. The administration is warned; however, that careful preparation is essential. To implement a system, program of instruction, or other changes in the school district without careful pre-planning and extensive program management, is to ensure failure. What is really being

advocated is that performance objectives be written to establish a focus for designing new or revising existing programs to best meet the selected target goals. For a complete review of the problems which must be considered in implementing the Phase II activities please refer to the previously mentioned *Curriculum Development Manual* for Phase II. The Phase II material also includes a *Programmed Course for the Writing of Performance Objectives.*

ALTERNATIVES AVAILABLE AFTER PHASE I

The design of the **Educational Planning Model,** as illustrated below, suggests alternatives that may be considered in completing the planning model activities.

PHI DELTA KAPPA
EDUCATIONAL PLANNING MODEL


Prioritization of Goals
Assessment of Perceived Needs
Analysis of Resource Allocations
Preliminary Identification of Target Goals
Curriculum Development Based on Performance Objectives
Expanded Needs Assessment
Identification of Target Goals

An examination of the flow chart on the facing page indicates that more than one activity can be completed simultaneously. For example, before the district can move beyond the Identification of Target Goals it is necessary that staff members be trained in Curriculum Development Based on Performance Objectives. On the other hand, a district might decide to complete the Preliminary Identification of Target Goals as discussed earlier in this manual, and then proceed to the Expanded Needs Assessment before beginning curriculum development.

Another option would be to complete the Analysis of Resource Allocations before going on to the next step in the model, or, to completely eliminate this portion of the model if the district is not interested in determining how current resources are allocated to existing educational programs. The purpose of the Analysis of Resource Allocations is to provide far more data than usually is available when budgets are developed. This information could prove to be invaluable in the event priorities must be established to live within a fixed budget. This information would identify what monies could be saved if low priority activities were eliminated.

It should be clear that new and/or modified instructional programs cannot be developed according to the **Educational Planning Model** until performance objectives have been developed. With the added emphasis created by minimum competency testing legislation, school districts may wish to focus on the critical skills required for competency tests. Again, the writing of performance objectives as outlined in the *Curriculum Development Manual* will provide the district with invaluable information for the development of new and/or revised instructional programs.

As illustrated in previous paragraphs of this section, several alternatives are available. Local, state, and national needs will determine which alternatives should be followed. Ultimately, existing educational programs will be revised or additional programs will be developed to do a better job of achieving the target goal(s).

APPENDICES

Appendix A, List of Goals and Goal Clarifying Statements

LEARN HOW TO BE A GOOD CITIZEN

A. Develop an awareness of civic rights and responsibilities
B. Develop attitudes for productive citizenship in a democracy
C. Develop an attitude of respect for personal and public property
D. Develop an understanding of the obligations and responsibilities of citizenship

LEARN HOW TO RESPECT AND GET ALONG WITH PEOPLE WHO THINK, DRESS, AND ACT DIFFERENTLY

A. Develop an appreciation for and an understanding of other people and other cultures
B. Develop an understanding of political, economic, and social patterns of the rest of the world
C. Develop awareness of the interdependence of races, creeds, nations, and cultures
D. Develop an awareness of the processes of group relationships

LEARN ABOUT AND TRY TO UNDERSTAND THE CHANGES THAT TAKE PLACE IN THE WORLD

A. Develop ability to adjust to the changing demands of society
B. Develop an awareness of and the ability to adjust to a changing world and its problems
C. Develop understanding of the past, identify with the present, and the ability to meet the future

DEVELOP SKILLS IN READING, WRITING, SPEAKING, AND LISTENING

A. Develop ability to communicate ideas and feelings effectively
B. Develop skills in oral and written English

UNDERSTAND AND PRACTICE DEMOCRATIC IDEAS AND IDEALS

A. Develop loyalty to American democratic ideals
B. Develop patriotism and loyalty to ideas of democracy
C. Develop knowledge and appreciation of the rights and privileges in our democracy
D. Develop an understanding of our American heritage

LEARN HOW TO EXAMINE AND USE INFORMATION

A. Develop ability to examine information constructively and creatively
B. Develop ability to use scientific methods
C. Develop reasoning abilities
D. Develop skills to think and proceed logically

UNDERSTAND AND PRACTICE THE SKILLS OF FAMILY LIVING

A. Develop understanding and appreciation of the principles of living in the family group
B. Develop attitudes leading to acceptance of responsibilities as family members
C. Develop an awareness of future family responsibilities and achievement of skills in preparing to accept them

LEARN TO RESPECT AND GET ALONG WITH PEOPLE WITH WHOM WE WORK AND LIVE

A. Develop appreciation and respect for the worth and dignity of individuals
B. Develop respect for individual worth and understanding of minority opinions and acceptance of majority decisions
C. Develop a cooperative attitude toward living and working with others

DEVELOP SKILLS TO ENTER A SPECIFIC FIELD OF WORK

A. Develop abilities and skills needed for immediate employment
B. Develop an awareness of opportunities and requirements related to a specific field of work
C. Develop an appreciation of good workmanship

LEARN HOW TO BE A GOOD MANAGER OF MONEY, PROPERTY, AND RESOURCES

A. Develop an understanding of economic principles and responsibilities
B. Develop ability and understanding in personal buying, selling, and investment
C. Develop skills in management of natural and human resources and the environment

DEVELOP A DESIRE FOR LEARNING NOW AND IN THE FUTURE

A. Develop intellectual curiosity and eagerness for lifelong learning
B. Develop a positive attitude toward learning
C. Develop a positive attitude toward continuing independent education

LEARN HOW TO USE LEISURE TIME

A. Develop ability to use leisure time productively
B. Develop a positive attitude toward participation in a range of leisure time activities—physical, intellectual, and creative
C. Develop appreciation and interests which will lead to wise and enjoyable use of leisure time

PRACTICE AND UNDERSTAND THE IDEAS OF HEALTH AND SAFETY

A. Establish an effective, individual, physical fitness program
B. Develop an understanding of good physical health and well being
C. Establish sound personal health habits and information
D. Develop a concern for public health and safety

APPRECIATE CULTURE AND BEAUTY IN THE WORLD

A. Develop abilities for effective expression of ideas and cultural appreciation—fine arts
B. Cultivate appreciation for beauty in various forms
C. Develop creative self-expression through various media—art, music, writing, etc.
D. Develop special talents in music, art, literature, and foreign languages

GAIN INFORMATION NEEDED TO MAKE JOB SELECTIONS

A. Promote self-understanding and self-direction in relation to student's occupational interests
B. Develop the ability to use information and counseling services related to the selection of a job
C. Develop a knowledge of specific information about a particular vocation

DEVELOP PRIDE IN WORK AND A FEELING OF SELF-WORTH

A. Develop a feeling of student pride in achievements and progress
B. Develop self-understanding and self-awareness
C. Develop the student's feeling of positive self-worth, security, and self-assurance

DEVELOP GOOD CHARACTER AND SELF-RESPECT

A. Develop moral responsibility and a sound ethical and moral behavior
B. Develop the student's capacity for constructive discipline in work, study, and play
C. Develop a moral and ethical sense of values, goals, and processes of free society
D. Develop standards of personal character and ideas

DEVELOP SKILLS IN MATHEMATICS AND SCIENCE

A. Develop ability to apply skills in real-life experiences
B. Develop a fund of information and concepts
C. Develop special interests and abilities

Appendix B, Adding, Deleting, or Adapting Goals

To date, most school districts have not modified the 18 goals nor have districts chosen to add goals. To provide for the instance where a school district would add a goal or goals, all working forms have been printed with space for two additional goals. As indicated in a previous section, new or modified goals are reviewed and either accepted or rejected at the first meeting of the representative community committee(s).

If the representative community committee elects to add a goal(s), the goal(s) can be assigned number 19 or 19 and 20. The numbers can then be used on all forms instead of taking the time to write out the new goal(s) statement(s) on all forms. The new goal(s) statement(s) and any clarifying statements can be written on an overhead transparency and projected for viewing by the members of the committee. The assigned number(s) will serve as the vehicle for recording the data related to the new goal(s).

If the representative community committee elects to delete a goal(s), each member can destroy the appropriate goal statement card(s) and directions can be given for the entire group to disregard the corresponding goal statements on all other forms used in the Phase I activities.

If the representative community committee elects to modify one or more of the 18 goals, suggested modifications can also be written on overhead transparencies and viewed by members of the committee as they complete the prioritization and perceived needs activities. Caution should be exercised to make sure that the committee does not become bogged down in arguments over the identification or "meaning" of goals.

Experience indicates that the interaction in the small groups is an extremely valuable experience; therefore, high priority should be given to this activity. It has proven to be an extremely effective and inexpensive method of communicating to community members the difficulties encountered when priorities have to be established.

The lack of monies for desirable educational programs often mandates changes in the allocation of resources. Without a process whereby viable input can be obtained from the community, the superintendent and/or board of trustees must assume full responsibility for the re-allocation of resources. Usually, this results in the formation of special interest groups with subsequent actions to generate pressure to influence or reverse the decisions involving allocation of resources. The availability of the data from the representative community committee can significantly reduce the influence of pressure groups and subsequently enhance the superintendent's and/or board of trustee's decisions.

Appendix C, Rationale for Number of Discs Used with Goal Display Board

There are spaces on the display board for 20 different goals with a maximum of 100 (20 x 5) spaces for red discs. In order to allow for maximum discrimination among goals, half of the possible spaces for red discs must be filled. Since there are 18 suggested goals in the model, the number of goals (18) multiplied by the number of spaces (five) for red discs per goal (90) divided by two equals the number (45) of red discs needed for 18 goals. The rule is that the number of discs used must be half of the number of available spaces. Therefore, a board with 16 goals (80 spaces) would use 40 discs, a board with 17 goals would use 42 discs (always round to an even number of discs).

A red card punched for 50 discs is available from Phi Delta Kappa's Center for Dissemination. If only the 18 goals are ranked, then 45 of the 50 discs are used. Nineteen goals would require 48 discs. Twenty goals would require the use of all 50 discs.

It is possible in round 2 of the small group process that a final consensus cannot be reached on

one or more goals. If this should occur the number of discs for the group will have to be reduced. The reduction in the number of red discs is made in order to guarantee that no group will have a mathematical advantage over the other groups. The following rule should be used to determine the number of discs that should be removed:

> If an even number of goals are being prioritized and consensus cannot be reached on one goal, two discs should be subtracted. If an odd number of goals are being prioritized and consensus cannot be reached on one goal, three discs should be subtracted. In either case—an odd or even number of goals—if consensus cannot be reached on two goals, five discs should be subtracted.

Appendix D, Directions for Individual Members of the Representative Community Committee

DIRECTIONS*

1. Make sure your materials include the following items:
   a. display board
   b. perforated goal statement card with 18 goal statements, and
   c. a set of 50 red colored discs.

2. Note: Punch out 45 of the red discs contained on the card (leave five discs on card).

3. Read each of the goal statements on the perforated goal statement card. As you examine each goal statement read the goal clarifying statements associated with it, as these are important for understanding the goal statement. As you read each goal ask yourself . . . .

   *How important is this educational goal for our school system?***

4. Separate each goal statement on the card and place it on the display board on a space in the column labeled Goal Statement. (If the materials have been used at an earlier date, the goal statements will already have been separated.) The order in which you place the cards on the board is not important. There should be one space for each.

5. Place a red disc in the column labeled number 1 beside each of the 18 goal statements. Each disc has a value of one "point".

6. Reread the goal statements. For those goals you believe to be more important, place another red disc beside each in the column labeled number 2.

7. Read the goal statements that have two red discs beside them. For those goals you believe to be much more important than others, place another red disc beside them in the column labeled number 3.

8. Read the goal statements that have three red discs beside them. For those goals you believe to be much more important than others, place another red disc beside them in the column labeled number 4.

   Have you used all of your red discs?
   If not, continue on to direction number 9.
   If yes, see direction number 10.

*Those committee members who have developed goals in addition to the original 18 goals must inform the program moderator at the beginning of the meeting for additional directions.

**If the model is implemented on a school basis or grade level basis one of the three following questions should be asked:

1. *How important is this educational goal for our elementary school(s)?*
2. *How important is this educational goal for our middle school(s) or junior high school(s)?*
3. *How important is this educational goal for our high school(s)?*

9. Read the goal statements which have four red discs beside them. For those goals you believe to be of extreme importance, place another red disc beside them in the column labeled number 5.

10. Review your display board and keep in mind the following:
    a. All 45 red discs must be used (each disc has a value of one point).
    b. At least one goal statement must have five red discs—five points—beside it.
    c. A maximum of five red discs—five points—are allowed for any one goal statement.
    d. It is not necessary for a goal statement to have a red disc beside it.
    e. In the event you wish to rearrange your display board, you may add or remove red discs—points—from the goal statements (remembering that discs must always be in horizontal sequence with no spaces between discs).

11. Transfer the total number of points for each goal to the Individual Goal Rating Sheet (on the reverse side of the Directions for Individual Members of the Representative Community Committee). *It is important to note that the goal statements found on this goal summary sheet are in random order and will not necessarily match the order in which you placed your goals on the goal display board.*

12. During the next few minutes you will be given a card assigning you to a small group (usually four persons). After completing your individual assignment, you will be working with your group in arriving at a consensus on a single display board.

13. Leave your display board at your position. Take the direction sheet to your small group meeting.

Appendix D, (continued) Individual Goal Rating Sheet

INSTRUCTIONS: Place the total number of points—red discs—you gave to each of the goals on your display board in the blank space found next to each of the goals on this page.

GOALS	My Individual Score For Each Goal	(Optional) Our Small Group Score
Learn how to be a good citizen		
Learn how to respect and get along with people who think, dress, and act differently		
Learn about and try to understand the changes that take place in the world		
Develop skills in reading, writing, speaking, and listening		
Understand and practice democratic ideas and ideals		
Learn how to examine and use information		
Understand and practice the skills of family living		
Learn to respect and get along with people with whom we work and live		
Develop skills to enter a specific field of work		
Learn how to be a good manager of money, property, and resources		
Develop a desire for learning now and in the future		
Learn how to use leisure time		
Practice and understand the ideas of health and safety		
Appreciate culture and beauty in the world		
Gain information needed to make job selections		
Develop pride in work and a feeling of self-worth		
Develop good character and self-respect		
Develop skills in mathematics and science		
_____		
_____		

Remember you will need this sheet for your small group meeting!

Appendix E, Directions for Small Group Leader

Each small group should have one display board, 18 goal statements, 45 red discs, and Directions for Small Group Leader, Round 1 and 2 (the Small Group Rating Sheet is on the reverse side of the round 2 directions).

a. There should be four committee members assigned to each group.
b. Each group will select a group leader.
c. The primary task for each group is to attempt to reach a "consensus score" for each goal statement.
d. The small group meetings will have two "rounds".

ROUND 1
DIRECTIONS FOR SMALL GROUP LEADER

1. Read the first goal statement under the column headed Goal Statement on the reverse side of the round 1 form.

2. Group members should read aloud their scores for that particular goal. The group leader's score should be read last. Record the scores on the lines under the goal statement.

3. Add all the scores for each goal.

4. Consult the chart of averages included on the round 1 form. Record the average. For example, if the four scores were 4,3,2, and 4, the total would be 13; consulting the chart of averages note that the average score for 13 is 3.25. Place average score in the box labeled "Avg.".

					Avg.
4	3	2	4	13	3.25

5. Repeat direction 1 through 4 above for each goal statement.

ROUND 2
DIRECTIONS FOR SMALL GROUP LEADER

1. The small group must now use the data recorded on the round 1 form, a display board, 45 red discs, and discussion to reach a group "consensus score" for each goal.

2. A consensus score is reached when three out of four members of the group agree on the score. For smaller groups, two out of three members must agree. For larger groups, three out of five must agree.

3. The group leader should first check the scores recorded on the round 1 form to find any goals where consensus has been tentatively reached. For those goals a check can be placed on the round 1 form beside the box for the average. If after group discussion, consensus still exists the number of red discs corresponding to the consensus score can be placed on the display board.

4. The group must then try to reach consensus on the remaining goals. For discussion purposes, it is recommended that the group leader again consult the round 1 form and begin discussion with those goals where there is the greatest agreement.

5. As consensus is reached on each goal, the corresponding number of red discs is placed on the display board.

6. If a consensus score cannot be reached for a goal, the spaces next to the goal on the display board are left blank and another goal statement is discussed.

   It is possible . . .

   —that all of the red discs—45 points—will be used before the group has ranked all of the 18 goals. In this case the group will have to read through the goal statements and make consensus score adjustments as required in the rules for use of the display board presented in the individual procedures.

   —that all of the red discs—points—will not be used in the initial group ranking process. In this case the group will have to read through the goal statements and make consensus adjustments because all red discs—points—must be used.

   —that a final consensus cannot be reached on one or more goals. If this should occur the number of red discs for the group will be reduced. This reduction in the number of red discs is made in order to guarantee that no group will have a mathematical advantage over the other groups. Please see the monitor if this occurs. The following rule should be used to determine the number of discs that should be removed:

   > If an even number of goals are being prioritized and consensus cannot be reached on one goal, two discs should be subtracted. If an odd number of goals are being prioritized and consensus cannot be reached on one goal, three discs should be subtracted. In either case—an odd or even number of goals—if consensus cannot be reached on two goals, five discs should be subtracted.

7. When consensus scores for all the goals have been reached the group leader should complete the Small Group Rating Sheet on the reverse side of the round 2 directions and notify the monitor that the group has completed its task.

Appendix F, Individual Rating of the Level of Performance of Current School Programs

DIRECTIONS:

Listed below are the goals established for the school district at the last meeting of the representative community committee. The goals are not listed in a priority order. Your task is to read each of the goal statements and ask yourself:

Community member: *"In my opinion,* how well are current programs meeting this goal?"*
Teachers/Students: *"How well are my school's current programs meeting this goal?"*

The answer to this question for each of the goals will provide the board of trustees, administrators, and teachers with the information needed to revise existing programs and to develop new programs for the students of the district. When the results are examined, the district will interpret your statements in the following manner:

NO RESPONSIBILITY means:
I believe programs in this area are not the responsibility of the school.

EXTREMELY POOR means:
I believe students are not being taught the skills necessary to meet this goal.
This goal is the school's responsibility but almost nothing is being done to meet this goal.

POOR means:
I believe programs designed to meet this goal are weak.
I believe that much more effort must be made by the school to meet this goal.

FAIR—BUT MORE NEEDS TO BE DONE means:
I believe present programs are acceptable, but I would like to see more importance attached to this goal by the school.
I would rate the school's job in this area as only fair; more effort is needed as far as I am concerned.

GOOD—LEAVE AS IS means:
I believe the school is doing a good job in meeting this goal.
I am satisfied with the present programs which are designed to meet this goal.

TOO MUCH IS BEING DONE means:
I believe the school is already spending too much time in this area.

EXAMPLE:

If one believed that the goal "Learn How To Be A Good Citizen" is being met quite adequately, a circle would be drawn around the appropriate number on the scale. The circled number would then be placed in the score box.

NO RESPONSIBILITY	EXTREMELY POOR	POOR	FAIR—BUT MORE NEEDS TO BE DONE	GOOD—LEAVE AS IS	TOO MUCH IS BEING DONE	Score
0	1	2	3	(4)	5	4

*The community member will be instructed to determine their answers based on:
—a districtwide basis; or
—a grade level basis—e.g. elementary, junior or middle, or senior high school; or
—individual school basis.

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Appendix G, Random Sample Techniques

RANDOM SAMPLE

A random sample may be chosen from a variety of populations. The more encompassing and generalized the population from which the random sample is chosen, the more representative of the total or grand population the random sample will be.

For example, if a representative group is to be chosen from a community, a random sample of the total community population would best meet this need. Unfortunately, in most cases, this is not possible. Therefore, a random sampling is performed on a sample population of the total community such as voter registration rolls, school parents' lists, telephone directories, utility company users, union membership lists, student enrollment data, or a combination of these sample populations. In each of these cases a portion of the community's population has been omitted by the very nature of the "exclusiveness" of the lists or rolls used. The best random sample would be the one generated by using the most inclusive or encompassing list or lists of the community's population.

The procedure for generating a random sample from a population base—list of names—involves the use of randomly generated digits—numbers found on lists of digits generated by computers. These randomly generated numbers can be found in a variety of sources.

The first step in choosing a random sample of names from a list is to number the names on the list in an ascending order starting from the number one. Each name has thus been assigned a number. The list of randomly generated digits is then referred to and digits are blocked into groups large enough to encompass the number set of the name list.

Example:

Randomly Generated Digits

132091123
247383506
120152789

The named and numbered population list goes from 1-480 (the number set); therefore, three-digit numbers are necessary.

One method to obtain this three-digit number set would be to draw a line down after each third digit.

132	091	123
247	383	506
120	152	789

Three of the "reference" random numbers would be 132, 247, 120.

Any systematic approach can be used to generate a set of reference random numbers: using the example above every number on every row of the randomly generated number list may be used, 132, 091, 123; or every number in each column may be used, 132, 247, 120; or going down the column lists diagonally 132, 383, 789 could be used. The only criterion is that the approach be consistent until the number of randomly generated numbers—number of names to be chosen—has been reached. The order of selection of the numbers becomes the order of selection of the names on the name list. Once the randomly generated numbers have been selected, the names that have been associated with these numbers are located on the name list and the random sample of populations—names—has been accomplished.

Example:

Randomly Generated Number List		
17	18	73
43	13	92
42	70	81
81	21	14
60	40	61

List of One Hundred Names

—
—
—
12 John Sample
13 John Doe
14 Sam Sneedy
15 Ike Pope
16 Hal Smith
17 Jim Johns
18 Johnny James
19 Basil Quinn
20 Paul Smith

—
—
—
42 Suzy Wong
43 Herb Moore
—
—
—
50 William Dean
60 Barbara Lee
61 Peggy Pen
—
—
—
80 Paul Hart
81 Bret Owens
—
—
—
100 Jerry Vale

In this example, the selection calls for seven names from the population and the technique is to use the randomly generated numbers. We select every number in each column and going in columns from left to right. The seven numbers selected are therefore 17, 43, 42, 81, 60, 18, and 13. The randomly selected names from the population are, in order of selection:

Jim Johns
Herb Moore
Suzy Wong
Bret Owens
Barbara Lee
Johnny James
John Doe

If a number selected does not correspond to a name on a list (e.g., the numbers go from 1-1,000 and the names number from 1-897 and the number selected from the randomly generated number list is 927), that selected number is dropped and the selection process proceeds as if it never occurred. If a number selected (e.g., 87) is selected twice—duplicated—it is dropped the second time (the same person cannot be on the list twice) and the selection procedure continues.

This method of selecting a random sample of names will produce a truly random population sample with no bias in the selection procedure nor in the names chosen. This would not be true of

picking every tenth or fifth name on a list since the list is usually in pre-selected biased order (such as alphabetical listings). In the method described there is a complete randomness of the generation of the numbers, and the technique for choosing numbers promotes this randomness. Thus, the corresponding names selected are truly random and are representative of the total population to be sampled.

STRATIFIED RANDOM SAMPLE

The stratified random sample technique is another method of ensuring that the representative community committee is selected without prejudice. In addition, this technique is effective in ensuring that all segments of the community which can be identified are represented on the committee in proportion to their numbers in the community. The following procedures are typical for this technique.

1. The superintendent and staff determine the demographic characteristics of the district. This can be done through the use of a "guesstimate" or by consulting the U.S. Census Bureau's General Characteristics of the Population. In most cases, the principals within the district have an accurate picture of the characteristics of the population residing in the schools' attendance areas.
2. The following example* shows a high degree of refinement. In most cases the selection of the committee membership need not involve this degree of accuracy.

SCHOOL DISTRICT X

The Socio-Economic Level Composition is:

Professional and Technical	10%
Managerial and Proprietal	10%
Clerical and Sales	20%
Craftsmen and Foremen	20%
Operatives	20%
Service Workers	10%
Laborers	10%

The Ethnic Origin Composition is:

White	70%
Black	20%
Mexican-American	10%

The Educational Level Composition is:

College	20%
High School	60%
Grade School	20%

To obtain the expected proportion of black clerical workers with college educations, for example, one would change the three appropriate percentages (20%, 20%, and 20%) to proportions (.20, .20, and .20), and then multiply the three together (.20 x .20 x .20 = .008). Changing back to percentages, this answer implies that approximately 1% of the community can be expected to be college educated blacks with clerical jobs, and 1% of the sample (if the sample is large enough to have a 1% representation) should be of that designated type. For small samples, it would be preferable to collapse some of the population descriptions so that the percentage for any group is fairly large. For example, one might collapse the socio-economic scale into three categories of professional/managerial, clerical/craftsmen, and operatives/service/laborers.

*Hoepfner, Ralph, et al. Elementary School Evaluation Kit Needs Assessment, Booklet II, Choosing Goals, School Evaluation Project Center for the Study of Evaluation, UCLA, p. 19.

Appendix H, Indirect Control Selection Strategy

The use of an "interim selection committee" to select the members of the representative community committee reduces the amount of personal preference exercised in the selection procedure by the superintendent and/or board of trustees and, therefore, is a publicly defensible selection strategy.

A pure random sample, a modified stratified random sample, or direct selection by the superintendent and/or board of trustees are methods which may be used to select the members of the interim selection committee.

The interim selection committee is an ad hoc committee and will be constituted only during the duration of the selection process. The committee should be charged with selecting and implementing the procedure used in the selection of the members of the representative community committee.

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Appendix I, Time Line Planning Form

ACTIVITIES	WEEK																			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Superintendent and/or board of trustees participate in an introductory presentation and commit the school district																				
Board/administrative/staff committee or district task force, hereafter referred to as "team," formed for initial planning																				
Team participates in "hands-on" experience using all Phase I materials																				
Overview of materials and/or "hands on" experience provided for board of trustees																				
Board approves strategy for selecting representative community committee																				
Presentation of audio-visual program to administrative and teaching staff																				
Implementation of community committee selection strategy																				
Personal letters and news release issued giving time, place, and format of first committee meeting																				
Conduct first community meeting																				
Issue news release announcing result of first meeting and date and time of second community meeting																				
Conduct second community meeting																				
Arrange for professional staff and students to complete Individual Rating of the Level of Performance of Current School Programs																				
Team prepares summary of Phase I activities																				
Team reviews alternatives for Phase II and III activities																				
Team submits recommendations for Phase II and III to board of trustees																				

Note: The time line planning form above lists only the major activities and should be viewed only as a guide when implementing all of the procedures outlined in this booklet.

Appendix J, News Release #1, Board Meeting

The _____ School District Board of Trustees announced today that a meeting will be held on ____(day and date)____ to consider an innovative revision of the district's educational planning program.

The outstanding feature of the proposal to be considered at the meeting, to be held in _____ ____(location)____ at ____(time)____, is the cooperation of citizens, teachers, and students in determining what the schools should teach.

The plan has been successfully used on a nationwide basis, in Canadian provinces, and in several foreign countries. The cost of the program is minimal. The only expense will be the purchase of instructional materials.

If the board of trustees votes to embark on this innovative venture, its first task will be to decide how to select the community representatives to serve on the citizens committee. This committee will be charged with identifying and ranking the goals of the schools in order of importance as a basis for deciding what should be taught.

Several plans for selection of the citizens committee(s) are possible; however, the most popular method is the random sample or chance selection of committee members, a method which ensures a fair representation of all elements in the population.

Interest in the plan has been spurred by the current attention to educational accountability. Developed by the Northern California Program Development Center and sponsored by Phi Delta Kappa, an international education fraternity, the plan is based on a series of steps that can require up to six months or more for the Phase I activities.

After the citizens committee(s) rank(s) the educational goals in priority order, the next step is for citizens, teachers, and students to evaluate the success of the present program in meeting these goals. Once this is accomplished the district will train teachers to write performance objectives that will assist in holding schools accountable for meeting the citizen-determined goals. If, as expected, the board of trustees approves the plan, the citizens committee(s) may be expected to be named within six weeks.

When the citizens committee meets, it will adapt for local use a set of suggested educational goals. The 18 goals provide the basis for the local program, but the local committee is encouraged to add whatever additional goals it considers appropriate.

Superintendent _____ has announced that periodic reports of the progress of the citizens committee will be made, and the public will be informed at the earliest opportunity of the ranking of goals agreed upon by the committee(s).

Appendix K, News Release #2, Approval by Board and Selection Procedure

At a meeting last night the board of trustees of the _____ School District voted unanimously to adopt a plan for developing educational goals with the cooperation of teachers, students, and a committee of citizens.

The plan was described in detail by ____(name and position)____ who stressed the importance of moving the schools into a position of accountability for meeting goals approved by the community. He also pointed out the success that this plan has enjoyed in communities where it has been applied.

Following approval of the plan the board discussed various methods of selecting the citizens committee that will rank the educational goals. Superintendent _____ emphasized that if the schools are to represent the people of the community, a concerted effort must be made to ensure that a broadly representative cross section of the community is selected to establish the goals.

The board agreed that selection of the citizens committee(s) should be made by ___(process)___. The committee(s) of from ____ to _____ members is/are to be selected not later than ___(date)___. Superintendent _____ will be available for consultation to assist in getting the committee into operation.

As soon as the community representatives are selected, meetings will be scheduled to rank educational goals in order of their importance. After the goals have been ranked, the committee(s) will meet again to determine how well the schools are presently meeting these goals.

Appendix L, Sample Letter #1, To Community Representatives

Dear _____:

The board of school trustees is requesting your participation in a valuable and unique process concerning the schools. Your assistance, in cooperation with other representative members of our community, is needed to help the district establish educational goals for learners.

We believe that this process will be different from many approaches to educational planning and will provide a stimulating and rewarding experience for those who participate. We are asking for a commitment on your part to assist us in this extremely important activity.

If you agree to provide this assistance to the district, we will ask you to attend two evening meetings. The first will be held on _____ and the second, one week later, on _____. The first meeting will last approximately three hours and the second meeting will last approximately 1½ hours.

The purpose of the first meeting is for this representative group from the community to list in order of importance educational goals for our schools. At the second meeting, we will ask the same citizens to look at each goal and to provide answers to the question: "In my opinion, how well are current programs meeting this goal?"

This process of ranking the goals in order of importance will give your district's teachers guidance and direction in their planning of lesson materials. During the course of several months, the teachers and administrators will then be writing measurable objectives to meet the requirements of the goals you have helped to set for the community.

We feel strongly that the schools belong to the people, that it is the responsibility of the members of the community to establish and rank educational goals. Once this is accomplished, it then becomes the responsibility of your school's professional staff to teach toward these goals.

We need your help, and we urge you to assist us in this vital activity by attending the meetings described above. Please take a moment now to complete the enclosed postcard for return to the district office, so that we can proceed with plans for the meeting.

If you accept this responsibility, you will receive prior to the first meeting an informational packet describing more fully the procedures in which you will be participating.

Sincerely,

Enclosure

Appendix M, Sample Letter #2, To Community Representatives

Dear _____ :

We appreciate your response to our request and are looking forward to seeing you at our first meeting to be held on _____(date)_____ , _____ p.m. at the _____(site)_____ .

As was stated in the first letter, the purpose of the meeting is for you, along with other community members, to rank a series of goals in order of their importance.

Enclosed with this letter is a list of 18 goal statements, which will be used as a basis for the ranking. These goals have been carefully selected, and we believe they cover all areas of education. The goals are not listed in any order of importance. We ask you to do two things prior to the meeting:

1. If there are educational goals that you believe are important, but not included in the list, please feel free to call the superintendent's office to discuss them.
2. We encourage you to discuss the goals with your friends and neighbors to get an idea of the goals they believe are important for the educational program for our schools.

The agenda for the first meeting will include:

1. Welcome, information, and directions for the evening
2. Ranking of goals by each individual
3. Small group meetings to discuss and reach agreement on importance of goals
4. Totaling of results from small groups
5. Final ranking of goals

If you have any questions regarding the goals or the procedures for the meeting, please call _____ .

Thank you again for your cooperation and assistance in this most valuable activity.

Sincerely,

Enclosure

Appendix N, News Release #3, Announcement of First Community Meeting

Superintendent _____ yesterday announced the names of _____ citizens who will serve on the representative community committee(s) to rank the goals of education.

The _____ men and _____ women named to the committee(s) are:

Selected to represent a cross section of the community, the committee(s) will meet on _____, at _____(location)_____ , at _____ p.m. to begin their task of ranking educational goals in the order of their importance. They will receive packets of material in advance of this meeting and will be expected to do their homework.

In announcing the appointment of the committee Superintendent _____ stressed the importance of their task, which may well shape the future of public education in the district for years to come.

"The ranking of educational goals by the citizens committee(s) will determine the emphasis and direction of the teaching effort in our schools," the superintendent said.

The ranking of goals by the citizens committee(s) is the first step in a noble process of involving teachers, students, and citizens in a hard look at what is being taught and why. The second step requires the participants to rate the success of the present educational program in meeting the recommended goals. Where the program is judged deficient, emphasis will be directed toward improving and strengthening that part of the curriculum, especially through the writing of performance objectives. Completion of the Phase I activities will require at least six months and even then will represent only the beginning of the effort to strengthen the educational program.

Appendix O, Mathematical Procedures for Tally Clerk—Prioritization of Goals

The mean score goal ratings are used to place the goals in a priority ranking order of most important goal to least important goal. The mean score goal ratings are calculated by adding up the group consensus goal ratings and dividing by the number of groups.

Example:

Goal 1 is rated as a 3 by Group A, as a 2 by Group B, as a 4 by Group C, and as a 0 by Group D. The mean score goal rating for the total group would be

$$\frac{2 + 3 + 4 + 0}{4} = \frac{9}{4} = 2.25$$

Goal 1 received a mean score goal rating of 2.25. Assume Goal 4 received a mean score goal rating of 3.5 and Goal 7 a mean score goal rating of 2.3. The goal priority ranking order would then be:

	Mean Score Goal Rating	Priority Ranking Order
Goal 1	2.25	3
Goal 4	3.5	1
Goal 7	2.3	2

The community considered Goal 4 most important, Goal 7 as less important, and Goal 1 as the least important of the three goals.

The ranking order of goals is a useful decision-making tool for a school district as it indicates the goal areas in which the community wishes the school to place the most emphasis.

It is possible to obtain even greater decision-making information by noting the degree of agreement or disagreement among all the consensus groups in the goal ranking for each goal. The greater the degree of agreement, the more confident school district personnel can be that they would be supported in the allocation of resources or initiation of programs either to meet an important goal or to de-emphasize an unimportant goal. The estimated population variance—"s^2"—is a useful tool for indicating the degree of agreement or disagreement among consensus group goal ratings. The lower the estimated population variance the greater the degree of agreement among groups as to the mean score goal rating. A statistical formula for calculating the estimated population variance is

$$s^2 = \frac{N(\Sigma x^2) - (\Sigma x)^2}{N(N-1)}.$$

Where N = number of consensus groups rating a goal, Σ means sum up the following, and x = a consensus group's goal rating. In the example referred to previously, the estimated population variance for Goals 1, 4, and 7 would be calculated in the following manner:

For Goal 1, N = 4; for Group A, x = 3; for Group B, x = 2; for Group C, x = 4; and for Group D, x = 0. Therefore:

$$s^2 = \frac{N(\Sigma x^2) - (\Sigma x)^2}{N(N-1)} \text{ means}$$

$$s^2 = \frac{4(3^2 + 2^2 + 4^2 + 0^2) - (3 + 2 + 4 + 0)^2}{4(4 - 1)}$$

$$s^2 = \frac{4(9 + 4 + 16 + 0) - (9)^2}{4(3)} = \frac{4(29) - 81}{12} = \frac{116 - 81}{12} = \frac{35}{12} = 2.9$$

The variance among the four groups, A, B, C, and D was 2.9.

Assume that the variance among the four groups for Goal 4 was calculated as .3, and for Goal 7 as .5. The table below summarizes the information obtained so far:

Goal	Mean Rating	Priority Ranking Order (Most important to least important)	Variance	Variance Ranking Order (Most agreement to least agreement)
1	2.25	3	2.9	3
4	3.5	1	0.3	1
7	2.3	2	0.5	2

Goal 4 was not only considered the most important goal but received the lowest of the three variance estimates. If a school district initiated positive action with respect to Goal 4, it could expect community support. If it decided not to initiate action on Goal 7 because of allocations to Goal 4, the community, since it showed a high degree of agreement on the lesser importance of Goal 7, would also probably support the school district's actions.

The community shows a considerable amount of disagreement on Goal 1. Therefore, any action by the school district with respect to this goal could be more risky for the administration than action on either Goals 4 or 7 and this will aid in the school district's action decisions about the three goals involved.

> A variance of .5 or less indicates a considerable amount of agreement.
>
> A variance of 1.0 or greater indicates a considerable amount of disagreement.

Appendix P, News Release #4, Announcement of Results of First Community Meeting

EDUCATIONAL GOALS RANKED

The ____(number)____-member representative community committee for the _____ School District met for three hours in its initial goal-ranking session last night.

Selecting from among 18 goals, the committee chose "_____" as the No. 1 goal for the district, with an average score of _____. _____ out of a possible 5.0. Second-ranked goal selected is "_____" with an average score of _____. _____. Third is "_____ _____" with an average score of _____. _____.

The other goals were ranked as follows: (4) "_____" _____. _____; (5) "_____" _____. _____; etc.

(Continue through goal #18.)

The committee will meet next ____(day)____ at ____(time)____ p.m., in the ____(place)____ to determine how well the district is meeting each goal.

Students in grades _____ and teachers will also make their own assessments of programs in relation to the goals.

Appendix Q, Sample Letter #3, To Community Representatives

Dear Community Member:

We wish to extend our thanks to you for participating in the community's first goal ranking meeting. We feel that the experience was successful and worthwhile, and the results will give our schools direction for the future. Enclosed is a list of the final ranking of the goals.

We wish to remind you of the second and final community meeting to be held on ____(day)____, ____(date)____, ____(hour)____ p.m. at the ____(place)____. The meeting should not last over 1½ hours.

For the selected goals we would like you to determine how well the schools are meeting each goal. This will be accomplished on a rating scale. We have enclosed a sample so that you may familiarize yourself with the process.

Thank you again for your cooperation and we will look forward to seeing you _____ evening.

Sincerely,

Enclosures: 1. Ranked goals
2. Sample rating scale

Appendix R, Mathematical Procedures for Tally Clerk—Perceived Needs

The mean for the subjective perceived needs scores given to a goal by a community committee can be calculated by adding the numerical scores given to the goal by all the committee members and then dividing that sum by the number of individuals in the committee.

Example: Ten community members assessed how well Goal 1 was being met by their community schools. The following table shows their assessment:

Community Member	Score
1	5
2	4
3	5
4	4
5	4
6	3
7	0
8	3
9	4
10	5

The mean assessment of perceived need by this community group was

$$\frac{5 + 4 + 5 + 4 + 4 + 3 + 3 + 4 + 5}{9} = 4.1$$

The one score of zero indicates that 10% regarded the goal as not being the responsibility of the school. The sum of the scores is therefore divided by nine instead of 10.

An average mean score of 2 or below indicates the school district apparently is not adequately meeting the expectations of the community members responding. A score of 3 means the school district is doing fair but that more needs to be done. A score of 4 means that the school district is on target in meeting the needs of the community. A mean score of 5 indicates that the group believes the school district is placing more emphasis on the goal than necessary. Individual scores of zero should be removed from the tabulation and the number of individuals with zero rating on a goal should be converted and reported as a percent of total group.

An average mean perceived need score of 3.5 can be considered to indicate that the group considers the school district to be meeting the need fairly well—above fair, but more needs to be done.

Goal 1 in the example above is being achieved at a level which is very acceptable to the community.

Variances can also be calculated along with goal ratings from the first community meeting. A computer is needed in this calculating process because of the considerable time required to find and calculate variances when a large number of individuals are involved.

Another useful statistic derived from the second community meeting is a "description of strata." There are five strata in the subjective perceived needs instrument:

Strata	Score Range
NO RESPONSIBILITY	0
EXTREMELY POOR	1
POOR	2
FAIR—BUT MORE NEEDS TO BE DONE	3
GOOD—LEAVE AS IS	4
TOO MUCH IS BEING DONE	5

The number and percent of the group which believes the school falls into each strata can easily be calculated.

Example:

	Goal 1 Rating	Goal 4 Rating
Individual A	1	3
B	2	4
C	2	2
D	3	4
E	5	3
F	5	2
G	3	3
H	4	3
I	3	4
J	0*	3
Mean Score	3.1	3.1

For Goal 1, a frequency count shows: one individual rating it as EXTREMELY POOR, two rating it as POOR, three rating it as FAIR, one as LEAVE AS IS, and two as TOO MUCH.

*To find the mean score eliminate the individual with a zero rating and divide sum by nine. The number of individuals with zero rating can be converted and reported as a percent of total group.

Since 10 individuals responded, the percentage of the population categorizing the degree to which the goal is being met as EXTREMELY POOR is 1/10 or 10 percent.

A table like the one below can thus be developed showing the percent of the group categorizing how each goal is being met into assessment strata.

	Goal 1	Goal 4
NO RESPONSIBILITY	10%	0%
EXTREMELY POOR	10%	0%
POOR	20%	20%
FAIR—BUT . . .	30%	50%
GOOD—LEAVE AS IS	10%	30%
TOO MUCH . . .	20%	0%

There is clear consensus in this example that Goal 4 is being well met by this school district, whereas, considerable disagreement exists among the population with the way Goal 1 is being met. Simply looking at the mean need rating score for the two goals would not have supplied such information, even if the zero score is included in the tabulation (28 divided by 10 equals 2.8).

Another example of format for reporting a strata description of goals and perceived needs is provided on the following page.

NOTE: If the Total Summary Sheet is used to record and tally the results of the perceived needs activities it will be necessary to enlarge the form. The existing form has only spaces for 15 scores. Additional forms may be cut and attached to a Total Summary Sheet. For example, by cutting and removing the goal statement section from a form, the remaining grid can be positioned and pasted over the columns headed Total, Average, Rank, and s^2. This will extend the number of spaces to 30 or any other multiple of 15.

GOALS AND PERCEIVED NEEDS
STRATA DESCRIPTION—COMMUNITY

Goal Rank	Goals	No Responsibility (%)	Extremely Poor (%)	Poor (%)	Fair—But... (%)	Good—Leave As Is... (%)	Too Much... (%)
1	Develop skills in reading, writing, speaking, and listening	0	10	30	42	12	6
2	Develop pride in work and a feeling of self-worth	0	10	75	5	7	3
3	Develop a desire for learning now and in the future	0	1	16	17	45	21
4	Develop skills in mathematics and science	0	4	72	10	1	13
5	Learn how to examine and use information	0	20	45	10	6	19
6	Develop good character and self-respect	0	3	66	2	24	5
7	Learn to respect and get along with people with whom we work and live	3	5	8	75	5	4
8	Learn how to be a good citizen	0	11	21	43	10	15
9	Learn about and try to understand the changes that take place in the world	5	8	5	13	57	12

A "need priority rank" can be assigned to each goal to assist in community reporting and in the school district decision-making process. The need priority rank is based on the mean need scores for each goal. The lower the mean need score, the greater the need. The goal with the greatest need will have the need priority rank of 1, the goal with the second greatest need will have the need priority rank of 2, etc.

To add to the information available for decision-making, the need priority rank for a goal can be calculated separately and compared for the community committee, teachers, and students. The data and summary of calculations can then be tabulated for ease in reading and analysis.

Example:

Community Priority and Need Priority Rank				Teacher Need Priority Rank		Student Need Priority Rank	
Goal Number	Goal Priority Rank*	Mean of Need Score	Need Priority Rank**	Mean of Need Score	Need Priority Rank	Mean of Need Score	Need Priority Rank
1	1	1.8	1	2.9	3	3.3	3
4	2	2.8	2	1.6	1	3.2	2
7	3	3.3	3	2.1	2	1.9	1
5	4	—	17	—	17	—	18
—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—
8	7	—	8	—	6	—	10
—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—
12	18	—	15	—	4	—	17

*Goal priority rank compiled after the first community meeting.
**Ranked in order of most to least need.

Comparison and summary of the information in this example shows that although there are slight differences in exact need priority rankings, all three groups—community, teachers, and students—rank goals 1, 4, and 7 in the top three in need priority rank. These high need priority rankings indicate considerable dissatisfaction among all three groups with the current school program relative to these goals.

For goal number 5 all three groups express agreement on a very low need priority rank. The community ranked this goal high in general goal priority and yet the community, teachers, and students give little priority to developing programs for further achievement of this goal.

For goal number 12, there is high discrepancy between teachers who felt this goal had a high need priority rank—4—and the community and students, who give much lower priority to developing programs for further achievement of this goal. What is the cause of this discrepancy? Is it a lack of understanding on the part of the students and the community on what the school is doing?

This data can be helpful to a school district in pointing out discrepancies in subjective assessment of the schools' achievement of goals among the various groups. The school district should look for causes of these discrepancies.

As discussed in the Expanded Needs Assessment section of this manual, data must be examined, or secured if not previously available, to determine if the perceived needs can be validated. This information will determine if the school district must develop new or revise existing educational programs or do a better job of communicating student achievement.

Appendix S, Sample Letter #4, Thank You to Community Members for Participation

Dear _____:

I would like to express my sincere appreciation to you on behalf of the students and staff of the _____ School District for your participation in the community meetings. We believe that for the first time we have information from the people of the community that can guide us in better serving the youth in our schools.

It is our hope that you will continue to follow the progress of our schools as we make every effort to meet the goals established by you and other interested community members. To make this possible, we will make it our responsibility to keep you informed of our efforts through periodic reports.

Our staff is committed to the plan and is already involved in defining our school programs through the writing of measurable educational objectives. Eventually, these objectives will be written for all criticial skill areas of the target goal(s) identified by the community. Once this has been done, we can begin developing curriculum to correct existing deficiencies.

Thank you again for your interest, cooperation, and support.

Sincerely,

Enclosure: Results of Second Community Meeting

Appendix T, Minnesota Legislation—Part of Chapter 271 of 1976 Omnibus Education Act

"Section 1. (DECLARATION OF POLICY.) The legislature finds that a process for curriculum evaluation and planning is needed for continued improvement of the educational program for all public school children in the state, and to allow for better evaluation of educational programs by local communities. The legislature further finds that such a process is needed to facilitate decisions by school boards and communities as to which services can best be provided by the public schools and which services can or should be provided by other institutions such as the family, the private sector, or other public agencies.

Section 2. (PLANNING, EVALUATION, AND REPORTING TO PUBLIC CURRICULUM ADVISORY COMMITTEE)

Subdivision 1. The school board of each school district in the state shall develop and adopt a written educational policy which establishes educational goals for the district, a process for achieving these goals, and procedures for evaluating and reporting progress toward the goals. The school board shall review this policy each year and adopt revisions which it deems desirable. School boards are encouraged to develop this school district policy and any revisions after consultation with the staff of each school building.

Subdivision 2. The school board shall instruct the administrative and professional staff of the district to develop an instructional plan for the purpose of implementing the goals established in the district educational policy within resources available to the district. Insofar as possible the instructional plan shall include measurable instructional objectives to assist in directing and measuring progress toward the goals established in the district educational policy. For goals toward which progress is not easily measurable, the instructional plan shall include other appropriate means to direct and evaluate progress.

Subdivision 3. Each school board is encouraged to appoint a curriculum advisory committee to provide for active community participation in the process of developing and revising the district educational policy, developing the instructional plan, evaluating progress, and reporting to the public.

Subdivision 4. Each year a final evaluation of progress shall be conducted, including both professional and consumer evaluations. The professional staff evaluation shall utilize test results and other performance data along with faculty interpretations and judgements. Consumer evaluation shall include the opinions of students, parents, and other residents of the community served by the school. Upon receipt of the evaluation reports, each school board shall review the results and develop appropriate school improvement plans to improve areas where goals of the district educational policy have not been met.

Subdivision 5. The district educational policy, the reports of the annual evaluation including summary test results, and the plans for school improvement shall be made available to the citizens of the school district through media releases and other means of communicating with the public. These documents shall also be on file and available for inspection by the public. Information copies of the reports shall be sent to the state board of education. All activities and reports pursuant to this section shall comply with Minnesota Statutes, Sections 15.162 to 15.1671, and any other law governing data on individuals in school districts.

Section 3. (ASSISTANCE TO LOCAL SCHOOL DISTRICTS)

Subdivision 1. Insofar as possible, the state board of education and educational cooperative service units shall make technical assistance for planning and evaluation available to school districts upon request during the 1976-1977 school year. The department shall collect the annual evaluation reports from local districts as provided in Section 2, subdivision 5 of this act, and shall make this data available upon request to any district seeking to use it for purposes of comparisons of student performance.

Section 4. (TIME OF IMPLEMENTATION.) School districts are encouraged to begin planning, evaluation, and reporting to the public pursuant to Sections 1 and 2 of this act during the 1976-1977 and 1977-1978 school years. All school districts in the state shall engage in planning, evaluation, and reporting to the public pursuant to Sections 1 and 2 of this act during the 1978-1979 school year and shall submit a report, which has been shared with the public and adopted by the school board, to the state board of education by August 1, 1979. During the summer of 1977, the state board of education shall report to the districts of the state the experiences of the demonstration projects authorized in Section 5 of this act and of any similar projects funded from other sources."